Ipsos MediaCT
The Media, Content and Technology Research Specialists

The mobile phone comes of age

A Thought Piece based on TouchPoints3 Data 2011

It is well-documented that technological advances in the mobile phone market have paved the way for dramatic developments to the mobile handset. The bulky, expensive contraption of the 1980s, restricted exclusively to calls, is now far-removed from today's slim-line, multi-media device that so effectively supports technological convergence.

Buoyed by the initial launch of the iPhone in 2007 and subsequent high-profile upgrades, the popularity and demand for smartphones have strengthened year on year. Data from the Ipsos MediaCT Technology Tracker show that between January and November 2010, smartphone penetration increased amongst the total adult GB population (15+) from 13% to 22%. This shows no signs of slowing. As prices of smartphones continue to fall, the population is becoming increasingly adept with new forms of technology and network offerings become more and more attractive to consumers.

As the functionality of the mobile phone grows, so too does the propensity to use it for a range of activities. Notably, it enables more traditional media content to be accessed on an alternative, digital platform and, importantly, whilst on the move; 39% of GB adults have used their mobile phone to listen to the radio, whilst 18% have watched TV programmes. In addition, the IPA TouchPoints3 hub survey tells us that, among the total GB adult population, the mobile phone is used for:

- Storing pictures or video clips (69%)
- Playing games (50%)
- Uploading pictures/video files to a PC (47%)
- Listening to music (47%)
- Accessing the internet (43%)
- Emails (33%)
- Social networking (29%)
- Video calls (26%)
- Using GPS services (23%)
- Online shopping (20%)

While these types of activities are significantly more likely to be enjoyed by the younger generations, they are not necessarily restricted to these groups alone; 59% aged 55+ have used a mobile for taking pictures/ video clips, 31% to access the internet, and 30% to send emails.

But what of calls and texting?

In light of the hype surrounding convergence and mobile media consumption, one could be forgiven for assuming that more traditional telephone conversations and texting have been confined to the Dark Ages, replaced by an ever-growing demand for more modern, technologically advanced mobile phone usage. Younger generations in particular are increasingly communicating via alternative means (e.g. social networking sites), which may be perceived as a threat to the future of traditional mobile phone usage.

The IPA TouchPoints3 media diary highlights that this could not be further from the truth and that the youngest age-group (aged 15-24) actually spend more time overall, either calling or texting on their mobiles, than any other. Figure 1 shows that mobile phone owners aged 15-24 dedicate 1 hour and 18 minutes per day to this, on average, compared to 44 minutes for GB mobile phone owners as a whole. However, there does appear to be some movement towards text messaging, rather than voice calls, as the preferred means of communication for this group. Whether this is as a result of lower expendable income amongst this demographic, provision of unlimited texts within service bundles, Pay As You Go deals, or a lasting shift in behaviour brought about by a growth in digital communication, will be an interesting trend to observe over future TouchPoints surveys.

On average, mobile phone users aged 15-24 spend an average of 55 minutes per day text messaging, compared to 35 minutes for 25-34s and 21 minutes for all GB mobile phone owners. In contrast, mobile phone owners aged 15-24 spend less time talking on their mobiles than those aged 25-34 and 35-54, at 23 minutes on average, compared to 33 and 29 minutes respectively. Only those aged 55+ spend less time talking on their mobiles (11 minutes per day).

Perhaps a key influence on this, as illustrated by the IPA TouchPoints3 media diary, is that chatting on a mobile is largely related to the hours of the working day, reaching a peak at 09:00 and beginning a steady decline at 17:00. However, there are stark variations by age, and particularly among those age-groups least likely to be in full-time employment, as illustrated in Figure 2. Those aged 15-24 reach a later and less emphatic peak at around midday, but tend to continue their communication much later in the evening (note the distinct peaks at 17:30, 20:30 and 21:30). In contrast, those aged 65+ display a lower but relatively consistent level of mobile phone usage throughout the waking hours.

Understanding more about mobile phone usage

As well as informing an understanding of the profile of mobile phone users and their weight of mobile phone usage, the TouchPoints3 media diary can provide insights into the types of activities that are taking place during the same half-hour time slots as mobile phone communications.

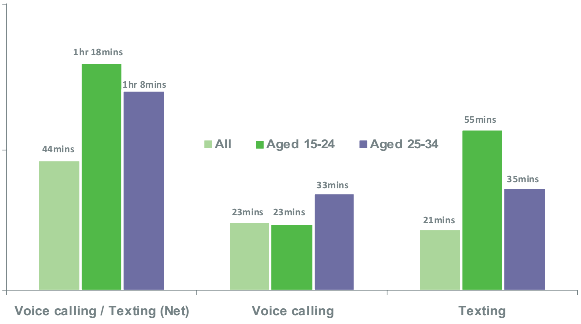
Far from being a solitary activity, 70% of time spent chatting on a mobile phone takes place whilst in the physical company of others (or during a half hour time slot when others are present). This is perhaps largely related to the aforementioned peak in calls during working-day hours.

Mobile phone communication also regularly takes place simultaneously with media consumption (or during the same half-hour slot) and TouchPoints3 data can help us to understand those media that appear to fit best with mobile phone usage. For example, in an average day, 16% of time-slots when mobile phone communication takes place are shared with TV viewing, while this proportion is 15% for radio. In contrast, only 2% of time-slots are shared with using the internet and reading newspapers. Such data appear to highlight the difference between so-called 'lean back' and 'lean forward' media and the appropriateness for mobile phone communication to take place at the same time. It may also indicate a keenness to share or discuss content consumed via TV or radio with others immediately, and so increase the potential for that information to be spread across a wider network.

The mobile future looks bright

As mobile phones continue to incorporate a growing range of functions, it will be fascinating to discover whether our dependence on the device also continues to grow. Currently, 53% of mobile phone owners claim they can't imagine life without their mobile phone and this is most likely to be the case amongst those aged 15-24 (74%). This bodes particularly well for mobile phone providers, especially as 1 in 3 intend to

Figure 1. Time spent using a mobile phone, on an average day



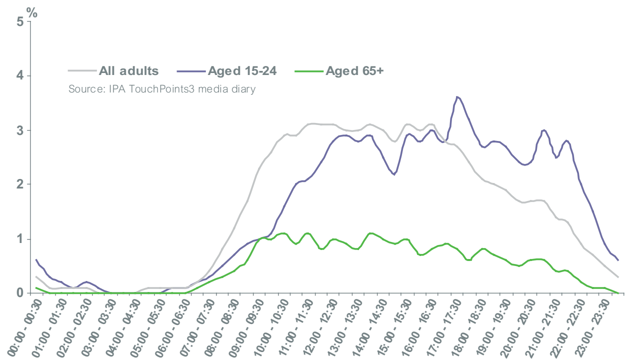
Source: IPA TouchPoints3 media diary (Base: All who own a mobile phone; aged 15-24; aged 25-34) replace or upgrade their handset within the next 12 months (rising to half among those aged 15-24).

As mobile phone technology continues to improve, the mobile phone industry also has the opportunity to strengthen the power of mobile advertising, which has gained momentum over recent years. In particular, against the backdrop of service launches such as Facebook's 'Places Deals', IPA TouchPoints3 hub survey data tell us that location-based information is currently welcomed by 17% of mobile phone owners (20% among those aged 15-24 and 29% among smartphone owners). As smartphone ownership and the potential for sharing location based information grows, future TouchPoints surveys will provide a key source of information into changing attitudes within the key market of mobile advertising.

Summary

The IPA TouchPoints3 hub survey helps us to understand current usage of mobile phones, including traditional communications via voice calls and texts, as well as emerging functions such as social networking and use of GPS. It informs us of when people use their mobiles, who they are with and what other activities they are doing at the time, whilst also providing attitudinal information, to highlight the continued importance of mobile phone communication within an increasingly converging and complex market.

Figure 2. Chatting on mobile in an average day – By age



About Ipsos MediaCT

Ipsos MediaCT helps clients make connections in the digital age. We are leaders in providing research solutions for companies in the fast-moving and rapidly converging worlds of media, content, telecoms and technology.

About IPA TouchPoints

IPA TouchPoints is a unique, consumer-focused, multi-media database produced specifically to provide insights into how people use all media.

The Hub Survey gives a unique view of how media usage fits into people's daily lives, through respondents recording their activities for each half hour across a week in an e.diary. The TouchPoints Channel Planner is created by integrating the industry media currencies onto the Hub Survey to provide the only industry available, multimedia channel planner.

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